

# Chapter Four: Position Detail Instructions

Initial position salary and fringe related information is based on a download from the PeopleSoft payroll system.

A summary of the windows and tabs used to view and prepare the total salaries budget request is presented below.

## **Checklist Window**

Position Detail Data – By checking Complete, the system will recalculate and allocate the total salary and benefits for the agency. The salary and benefits amounts will be posted to each reporting level in the budget request.

## **Position Information**

Position List tab – Provides a list of each employee by name, position number, and position type. Each employee is listed twice, once for each fiscal year of the biennium. This window is used to add new FTE.

Position Info tab – Used to view, update, and enter specific data for an individual employee position such as classification code, salary level, pay type, and position type. This window is also used to unfund an existing position.

Position Benefits tab – Used to view, update and enter fringe benefit information for specific individuals.

Position Benefit Calculations tab – Used to view the resulting salary and benefits amounts based on the information entered in the Position Info and Position Benefits tabs.

Position Calculations tab – Displays monthly salary and benefit data for a specific individual.

Position Allocation tab – Used to specify the reporting levels and funding sources for each position.

Position Employee tab – Displays the employee ID number, name and anniversary date for existing employees. Also used to enter a new employee.

## Position Data

### Position Data Screen

Yr	Emp ID	Pos Type Cd	Pos No	Seq No	Pos Name	Class Cd	Title
2011	0284684	R	00006524	1	Webb, Janine C	9002	Appointed-Not Classified
2012	0284684	R	00006524	1	Webb, Janine C	9002	Appointed-Not Classified
2011	0228195	R	00006525	1	Gerst, Troyd A	1270	Art Programs Admin.
2012	0228195	R	00006525	1	Gerst, Troyd A	1270	Art Programs Admin.
2011	0291724	R	00006526	1	Ehreth, Linda K	1270	Art Programs Admin.
2012	0291724	R	00006526	1	Ehreth, Linda K	1270	Art Programs Admin.
2011	0342727	R	00006527	1	Schmidt, Amy Rae	0823	Public Information Specialist
2012	0342727	R	00006527	1	Schmidt, Amy Rae	0823	Public Information Specialist
2011	7004752	R	00006528	1	Ferderer, Eileen M	0911	Administrative Officer I
2012	7004752	R	00006528	1	Ferderer, Eileen M	0911	Administrative Officer I
2011	0	R	0010	1	Vacant	0001	Education Program Administrator

### Navigation

Log on=>Menu=>Preparation=>Position Data Maintenance=>Position Information=>Position List tab

or

Checklist=>Position Detail Data=>Position List tab

### Purpose

Add, delete and change employee name, position number, identification number, and position type. This screen is also used to add new FTE that are being requested. Vacant, shift differ, overtime, temp and board member positions are not included in the initial payroll download and need to be added to the position list. A line of data must be completed for each year of the biennium.

### General Information

Before updating the Position List, note the following:

- Emergency Commission and Budget Section approved positions continuing into the next biennium must be requested as new positions and requested through a Budget Change Package.
- New employees, additional temporary, overtime or shift differential dollars, and other salary changes that will increase the budget request must be documented and requested through a Budget Change Package, regardless of the funding sources used.
- The positions on the Position List window may be sorted according to the user's preference by clicking on the corresponding column heading.

- The system rounds if more than two decimal places are used.
- Temporary, overtime, board member, shift differential, pooled and equity adjustment are not included in the position data download. These position types must be added. A separate position should be set up for each reporting level in which temporary, overtime, shift differential, equity adjustment, and pooled positions are used. Multiple temporary, overtime, pooled, or shift differential positions may be in one reporting level as Temp1, Temp2, Overtime1, Overtime2, etc.
- For shared positions, the total FTE must not exceed 100 percent.
- If an employee is being paid from more than one reporting level, the total must not exceed 100 percent. The percent can only be entered up to two decimal places.
- The only agencies that may use “Pooled” positions are components of North Dakota University System.
- If funding allocation for salary increases is different than regular salary, the regular salary allocations and the salary increase allocations must each equal 100 percent.

### Using the Window

On the Reporting Levels tab, expand the reporting levels and select the appropriate reporting level. To view a list of all agency positions, select the top, agency name reporting level.

Click the Add icon on the action bar to add a new record, or click on an existing record, to make changes to the present data.

### Add an Existing Agency Position

From the Position List window, select the reporting level, and click the Add icon. Select **Add Position** from the dialogue box. Enter all required information on Position. Click the Save icon when the record is complete. Click the **Pos Benefits** tab and select benefit types for this position. Click the save icon. Return to the **Pos Info** tab. In the Replicate Position box at the bottom of the window, put a “1” in **# of Positions to Replicate**; choose **Selected Year to Other Year** in Copy Options. Leave New FTE Indicator set to copy. Vacant and Annotate Position Name should be blank. Click the **Replicate** button to copy this position to the second year of the biennium.

### Add a Record for a New FTE

From the Position List window, select the reporting level, and click the Add icon. Select **Add Employee** from the open dialogue box. Enter “0” in the **Emp ID** field. “Vacant” appears in the **Name** field. Return to the **Pos List** tab and click the **Add** icon. Populate all fields, using “1” in **Step**, and “0” in **Emp ID**, which should then display “Vacant” in the **Name** field. The **Compute Increase Indicator** must be checked if this position is eligible for general salary increases. The **New FTE Indicator** must be checked for all new positions. Update the record by clicking the **Save** icon. Navigate to the **Position Benefits** and **Position Allocation** tabs, populating all required fields and saving when complete. Return to the **Position Listing** tab and use the Replicate Position box to copy this position to the second year of the biennium.

Replicate Position

The Replicate Position function can be used for adding multiple positions by changing the **# of Positions to Replicate** and the **Copy Options** to copy to one or more years of the biennium. When copying to multiple positions, select the “Annotate Position Name” indicator to auto-generate a unique name for each new position. Return to the **Position Listing** tab and select a newly replicated position. Change the **Position Number** to a unique sequence, the **Emp ID** to “0”, and clear out the **Revised Position Name** field. Save the updated record.

Add a Board Member

Board Members can be added one of three ways:

1. Click the **Add** icon and input a specific position number for each member and insert the Board Member’s Employee ID and Name.
2. Click the **Add** icon and input Board Member 1, Board Member 2, etc. in the Position No, Employee ID, and Name fields.
3. Use one entry for the biennium or one entry per year, for all board member compensation. To accomplish this, enter the words “Board Member” in each of the fields, and enter a total amount for the salaries for all members.

**Tip** *If one position is split between two or more reporting levels, enter one position number and allocate that position, using the Position Allocation tab, to the appropriate reporting levels.*

Temporary Employees, Shift Differential, Overtime and Equity pools

If an agency has multiple temporary employees, shift differential, overtime and equity pools, each should be identified in the Position Number and Employee Identification fields with a sequentially numbered title such as Temp 1, Temp 2, and Overtime 1 and Overtime 2. **Zero “0” should not be used in the employee identification number field for these Position Types.**

## Temporary

Budget for temporary positions using the **Position Type Code** “T - Temporary.” Type “Temp” in the position number column. On the **Position Benefits** tab select the standard fringe rate, leaving other benefit types blank. Select class code 9008 or 9031 to 9038. Enter one FTE. The FTE field is required for the compensation amount to calculate correctly, however, the FTE will not be added to the agency’s FTE total.

## Board Member

Budget for board member compensation using the **Position Type Code** “B – Board members.” Budget for board member compensation using a lump sum for all board members, or enter individual board members. On the **Position Benefits** tab select the standard fringe rate, leaving other benefit types blank. Select Class Code 9006. Enter one FTE. The FTE field is required for the compensation amount to calculate correctly; however, the FTE will not be added to the agency’s FTE total.

**Resident Worker** Budget for residents who are paid for hours worked using the **Position Type Code** “W – Resident Workers”. This position code is applicable only for the Veterans’ Home and the State Hospital. On the **Position Benefits** tab select the standard fringe rate, leaving other benefit types blank. Select class code 9008 or 9031 to 9038. Enter one FTE. The FTE field is required for the compensation amount to calculate correctly, however, the FTE will not be added to the agency’s FTE total.

**Equity Adjustment** Use position type “E – Equity Adjustment” on the **Position Information** tab for salary equity increases. Do not check the compute increase indicator checkbox. On the **Position Benefits** tab, leave all benefit fields blank. Select Class Code “9998.” Enter “1” in the FTE field, “annual” in the Pay Type field, and “0” in the Rate field. Enter the total biennial cost of the equity adjustment, along with any associated fringe benefit costs, in the Lump Sum Amount field. Enter “Equity,” or a similar short description, in the Lump Sum Description field.

**Tip** *Salary Equity adjustments will not be displayed on the CR02 reports because that report does not include lump sum amounts.*

**Underfund Salary** Use position type “U - Underfund Salary” to reduce the salary budget by a lump sum amount as discussed with the assigned budget analyst. Do not check the compute increase indicator checkbox. On the **Position Benefits** tab, leave benefit fields blank. Select Class Code “9998.” Enter “1” in the FTE field, “annual” in the Pay Type field, and “0” in the Rate field. Enter the total biennial cost of the underfunded share of salary, along with any associated fringe benefit costs, as a negative number, in the Lump Sum Amount field. Enter “Underfund Salary,” or a similar short description, in the Lump Sum Description field.

**Executive Budget Adjustment** The position type “X – Executive Budget Adjustment” is for OMB use only.

## Position Information

### Position Information Tab

### Navigation

Log on=>Checklist=>Position Detail Data=>Position Information Tab

### Purpose

The Position Info tab is used to enter individual position data, such as class code, position number, position type, and payroll rates. The initial data in IBARS is based on the month of the download from the PeopleSoft payroll system.

### Using the Window

Select an employee record on the Position List window to navigate to the Position Info tab for that record. The salary information is displayed in each field for that particular position. If a new record is being added the fields will be blank.

This window contains the Position Classification code, Position Number, Employee ID, FTE, Position Type Code, Pay Type Code, Unfunded Indicator, Rate of Pay, and Duration. Review the information for accuracy. Make changes by clicking on the specific field, enter the correct value, and then tab to the next field.

Year

In order for a position to be fully funded, there must be one position for each year of the budget biennium: 2011 and 2012.

Class Code

Refer to the Appendix for a list of [Job Class Codes](#). Same as the code used in PeopleSoft payroll.

Position Number	Unique indicator based upon PeopleSoft payroll records or agency numbering system.
Step	Field is not used by North Dakota and has been disabled.
Position Sequence No.	Populated automatically by IBARS if a position number is used more than once for a given year.
FTE	Portion of a full-time position held by the employee.
Employee ID	This is the PeopleSoft Employee ID number. Enter “0” for vacant positions, which will automatically insert “Vacant” in the Name field.
Employee Name	Downloaded positions are prepopulated. For vacant or new positions it automatically populates based upon the employee ID.
Unused Fields	Some fields are not used by ND and have been disabled. The fields labeled Anniversary, Longevity, Date 2, and Date 3 are not applicable to North Dakota and will not be used by agencies in preparation of their budget.
Position Type Code	<p><b>B</b> – Board Members –Board members are not included in the payroll download and must be added to the Position List.</p> <p><b>E</b> – Equity Adjustment – Code is used by agencies to add a pool of funds for salary equity.</p> <p><b>F</b> – Faculty and <b>L</b> – Pooled are only used by components of the North Dakota University System.</p> <p><b>O</b> – Overtime</p> <p><b>R</b> – Regular Employee – The code for permanent employees used by North Dakota.</p> <p><b>S</b> – Shift Differential – Code is used by agencies for shift work compensation, such as the Mill and Elevator.</p> <p><b>T</b> – Temporary –Temporary positions are not included in the download information from the PeopleSoft payroll and must be added to the Position List.</p> <p><b>U</b> – Underfunded Salary – Code is used by agencies to underfund the salary plan in anticipation of savings related to vacancies and turnover.</p> <p><b>W</b> – Resident Worker used only by State Hospital and Veterans’ Home, etc. Resident workers will have to be added and are not included in the payroll download.</p> <p><b>X</b> – Executive Budget Adjustment – To be used by OMB only.</p>

Pay Type Code	Can choose Annual, Bi-Weekly, Daily, Hourly or Monthly as appropriate for each employee.
Duration	Prepopulates based on Pay Type code used. Contact the assigned budget analyst before changing to fit a unique situation.
Unfunded Indicator	Select “Funded” for funded positions and “Unfunded-Do Not Post” for unfunded positions. The “Unfunded-Do Not Post” option allows existing positions to be excluded from the budget request without deleting the position record. Do not mark a position as unfunded if the position is part of an optional request. <b>Do not use “Unfunded – Post” (this option is not used by North Dakota).</b>
Rate	Wage paid to an employee that corresponds with Pay Type code used. The rate must reflect the full FTE rate for partial FTE positions. For example, a .5 FTE making \$1,000 per month is entered as .5 in the FTE field and \$2,000 in the rate field, and monthly in the pay type field.
Compute Incr Ind	The compute increase indicator is automatically checked for each employee position. A check mark in this box means that the position is set to receive any statewide compensation increase that is recommended. Uncheck the box if a position should be excluded from the increase, such as in the case of board members and temporary positions.
New FTE	Place a check mark in this field if the position is a new position for the agency.
Salary Amount	This is a calculated field utilizing the entered rate and duration.
Budget Change	The Budget Change field must be used for all new positions that will result in an increase or decrease from the present budget. Select the appropriate Budget Change Package from the dropdown list.

**Tip** *Budget changes should be entered for both years of the biennium for each position.*

Lump Sum Amount	Can be used to budget for items such as retirement payout, equity requests, etc. Enter the dollar amount of the request.
Lump Sum Descript	Enter a short description for lump sum amounts requested.
Revised Position	

Name	Only used when replicating positions. See instructions later in this chapter.
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Once an employee record is complete, click the Save icon in the Action Bar to save the data.

### Replicate Position

# of Pos to Replicate	The number of positions to be generated during replication.
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Copy Options	Select the years to which the existing position should be copied for the new positions.
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New FTE Indicator	If selected, copies the New FTE Indicator to the new record.
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Vacant	If selected, the replicated record will have a “0” in the <b>Emp ID</b> field and <b>Name</b> will be “Vacant”
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Annotate Position Name	If selected, changes the <b>Name</b> field to “Copy of xxxx” for the replicated record.
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## Position Benefits

### Position Benefits Tab

### Navigation

Log On=>Checklist=>Position Detail Data=>Position Information Tab=>

### Purpose

The Position Benefits tab is used to enter individual position data, such as health insurance, FICA, unemployment, and workers compensation codes. The initial data in IBARS is based on the month of the download from the PeopleSoft payroll system.

### Using the Window

Select with the cursor an employee record on the Position List window. Click on the Position Benefits tab. The downloaded benefit information is displayed in each field for that particular position. If a new record is being added, the fields will be blank.

The window includes the fringe benefit fields of Health Insurance, FICA, Retirement, Unemployment, Workers Compensation, Medicare, Life Insurance and Employee Assistance. The Standard Fringe field is used only for positions that do not receive the full state benefit package.

Refer to the Appendix for the list of Fringe Benefit Codes.

Review each position to make certain the benefit information is accurate and current. To make changes, click on the selection in the drop down next to each field. Tab to the next field. Click the Save icon when all fields are completed.

**Tip** *The Standard Fringe field is used for Temporary Employees, Resident Worker, Board Member and Pooled positions only. If this field is used, the other fringe benefit fields should remain blank.*

## Benefit Calculation

### Position Benefit Calculation Tab

Benefit Type	Detail Amt	Sub Amt	Grand Amt
Base			
Salary		30,000.00	
Benefits			
Emp Assistance Prog	17.04		
FICA	1,860.00		
Health	9,911.64		
Life Insurance	3.36		
Medicare	435.00		
Retirement	2,778.00		
Unemployment	60.00		
Workers Comp	689.13		
Subtotal		15,754.17	
Base Total			45,754.17
Grand Total			45,754.17

### Navigation

Log On=>Checklist=>Position Detail Data=>Position Benefit Calculation Tab

### Purpose

This is a **view only window** that provides an itemized list, per employee position, of salary and fringe benefits calculations. Users cannot make entries on this screen.

## Position Calculation

### Position Calculation Tab

Internet Budget and Reporting System

Friday, April 30, 2010

Pos No: 1000001 Pos Seq No: 1 Yr: 2011 Name: JIM Rpt Lvl: 00 Children's Svc Coord. Committee (Lvl 1) Summary Detail

		Salary	Emp Assistance Prog	FICA	Health	Life Insurance	Medicare	Retirement	Unemployment	Workers Comp
07/01/2011	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	25.00	69.75
08/01/2011	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	25.00	69.75
09/01/2011	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	10.00	69.75
10/01/2011	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	69.75
11/01/2011	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	69.75
12/01/2011	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	69.75
01/01/2012	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	69.75
02/01/2012	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	69.75
03/01/2012	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	69.75
04/01/2012	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	61.38
05/01/2012	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	0.00
06/01/2012	Est	2,500.00	1.42	155.00	825.97	0.28	36.25	231.50	0.00	0.00
Total		30,000.00	17.04	1,860.00	9,911.64	3.36	435.00	2,778.00	60.00	689.13

Done

### Navigation

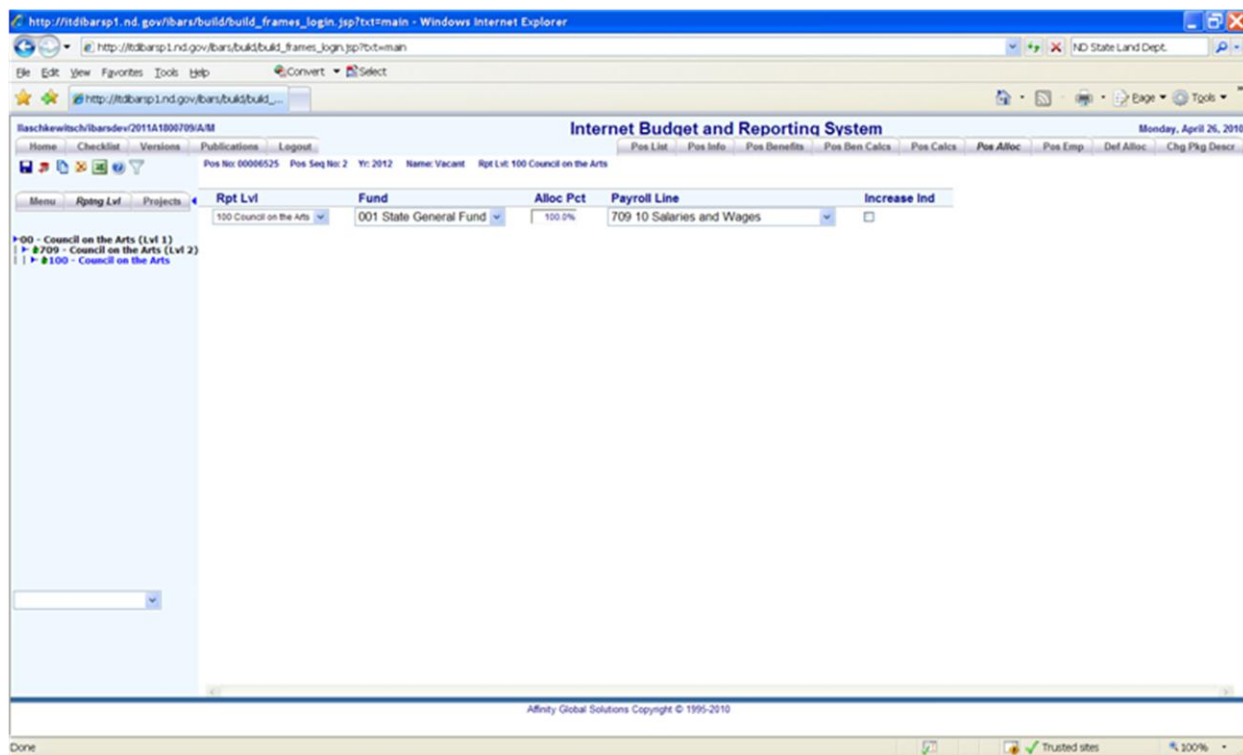
Log On=>Checklist=>Position Detail Data=>Position Calculation Tab

### Purpose

This is a **view only window** that provides a monthly itemization, per employee position, of salary and fringe benefits calculations for each month. Users cannot make entries on this screen.

## Position Allocation

### Position Allocation Tab



### Navigation

Log On=>Checklist=>Position Detail Data=>Position Allocation Tab

### Purpose

To allocate the salary of the selected position to reporting levels and specific funding sources.

### Using the Window

Go to the Reporting Level field and select from the drop down list, the reporting level that will be used to begin the allocation of salary.

**Tip** *The Position No., Position Sequence Number, Year, Employee Name and Reporting Level are displayed at the top of the window to assist users. Review this information to ensure that the correct position is open before entering allocation data.*

**Tip** *For existing positions, the information displayed in each of the fields is based on the allocation used in the PeopleSoft payroll download. If the data is the same as the allocation method for the next biennium, no entries are required on the screen.*

If allocation changes are required, tab from the Reporting Level field to the Fund field. The drop down box will provide the choices of General Fund 001, specific Special Funds used by an agency, and Federal Funds listed by individual grant numbers. If a fund is missing from the selection, contact the assigned budget analyst.

Make a selection from the choices, tab to the Allocation Percent field. Enter the decimal value less than or equal to 1.00 for the portion of salary that will be charged to the fund identified in the Fund field.

Tab to the Payroll Line field. Choose, from the drop down box, the appropriation line item that will be used to budget the salary expenses. In most cases this is 10 - Salary and Wages; however, some agencies budget salaries to special line appropriations.

The Increase Indicator field should remain blank in most cases. When the funding allocation for the executive salary increase is different than for the base salary, insert a new line. Place a checkmark in the field indicating that these allocations should be used for salary increases only.

Click the Save icon to save the data.

If additional allocations are required, use the Add icon. Follow the same process as described above until total percent reaches the level desired for this reporting level. Repeat this process for the second year of the biennium.

**Tip** *If a position needs to be moved from one reporting level to another, simply change the reporting level for that individual on the Position Allocation tab rather than deleting and creating a new position on the Position List tab. Remember to update the allocation for each year of the biennium.*

## Funding Reallocation

### Default Allocation Window

#### Navigation

Checklist=>Position Detail Data=>Default Allocation Tab

#### Purpose

To perform funding reallocation of positions within a selected reporting level.

This function is not currently available. Users will be notified when the functionality is enabled.

## Salary Increase

### Salary Increase Window



### Navigation

Log on=>Menu=>Position Data Maintenance=>Salary Increase

### Purpose

This screen can be used to run various salary increase scenarios for an entire agency and apply increases to all or select groups of agency positions.

### Using the Window

This function is not currently available. Users will be notified when functionality is enabled.